

Getting Started with Aipex

A Quick Start Guide to Tassient's AI-First RMM and Remediation Platform

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Getting Started with Aipex

This is a short, fast-paced introduction to get you started with Aipex as quickly as possible.

A large portion of this intro focuses on Aipex's AI Assistant function, as it is a massive differentiator from other RMM solutions that you have used before.

Aipex is SaaS-based, which means that most organizations can install and begin monitoring devices within 5 minutes!

NOTE: As Aipex is a dynamic SaaS-based application, it is continually evolving, so the screen captures in this document may differ slightly from what you see on your system.

Planning for Aipex

Using Aipex, Tassient's powerful AI-first Remote Monitoring and Management (RMM) and, most importantly, remediation platform, is straightforward. However, successful deployment isn't just about pushing Aipex to your users' endpoints; it requires a structured approach.

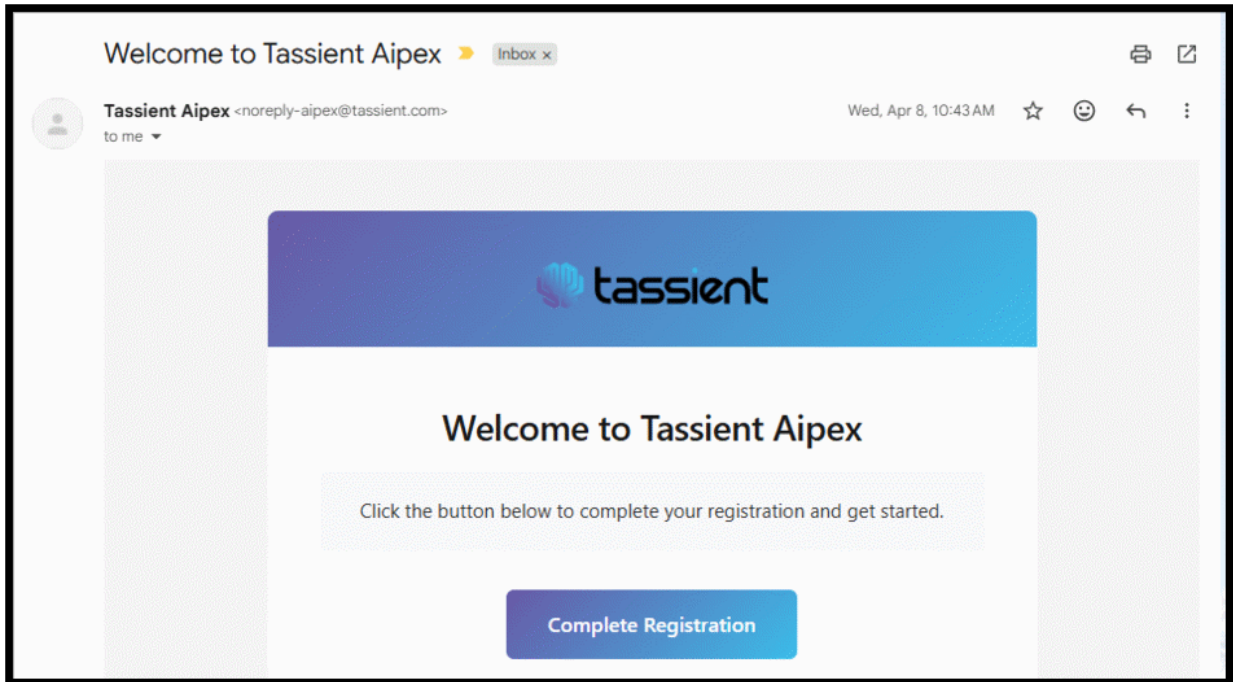
Below are the steps you will need to take before deploying Aipex.

- Sign up for Aipex at <https://tassient.com/>
 - After signing up for Aipex, you will receive a welcome email from Tassient Aipex within 24 hours (usually much sooner) with a link to complete your registration and get you started.
- Deploy your first devices
 - We find many users find it useful to deploy Aipex to one or two devices to become familiar with it before doing large-scale deployments.
- Identify the users and departments that will have Aipex deployed on their devices.
- Identify the administrators who will have access to the Aipex dashboard and which machines they will monitor and manage.
- If necessary, identify and correct firewall rules that prevent outgoing connections to aipex.tassient.com and artifacts.tassient.com. Usually, this is not an issue, as Aipex only uses outgoing connections over HTTPS.

- Identify and correct any issues with antivirus software that will prevent the agent from running as a service. The service's names are Tassient Aipex and Tassient Core.

Initial Sign-in to Aipex Dashboard

Click the link in the "Welcome to Tassient Aipex" email you received and complete your registration.

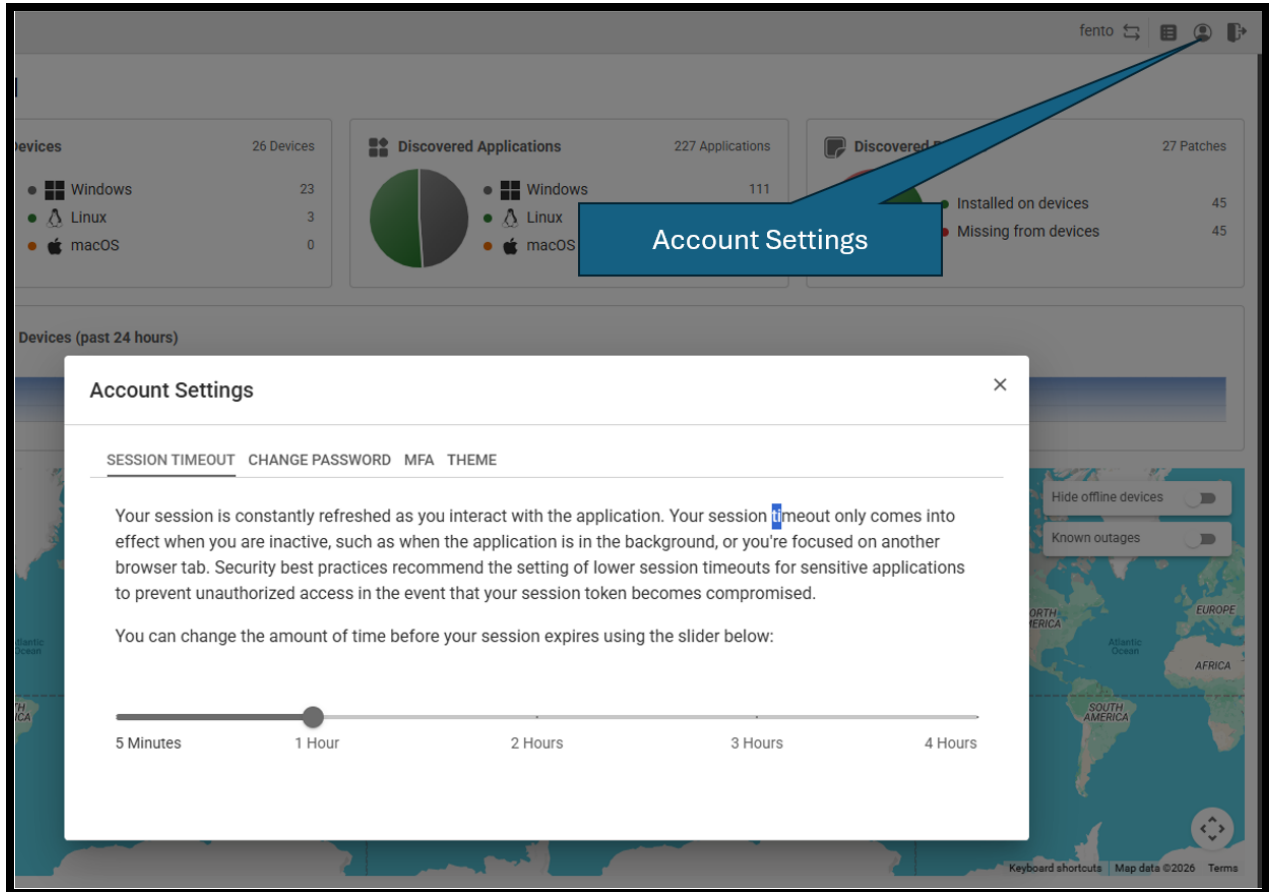


The initial dashboard lets you create an Aipex account using your Google or Apple account, or with a username and password. (TIP! Talk to Tassient if you want to use Microsoft Entra ID for authentication - it can be done!)

Before deploying the agent, you will want to adjust various settings on your Aipex home dashboards, create device groups, and add additional administrators if desired.

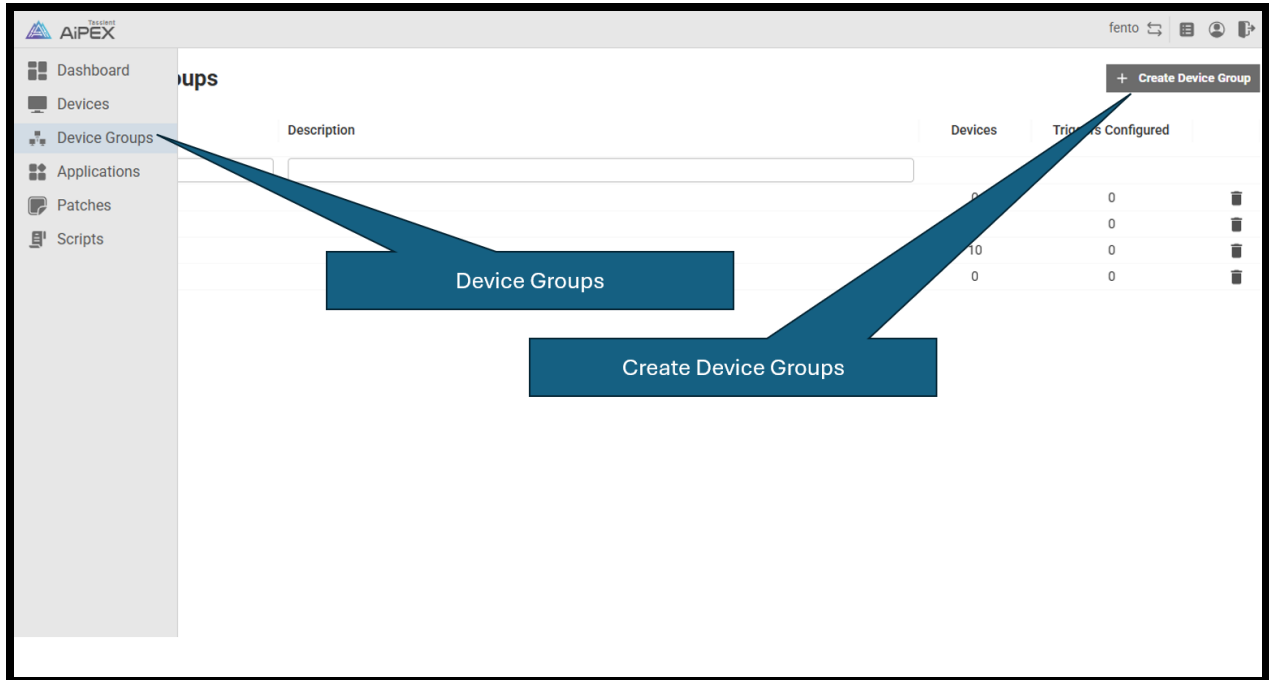
- **Set Dashboard Session Timeout**

After signing in to your Aipex dashboard, set the dashboard timeout by clicking the account settings icon (person in a circle) > Session Timeout, then adjusting the timeout value. We suggest starting with 1 hour and then readjusting it as needed. Click the dashboard icon (four squares) to return to the home dashboard.



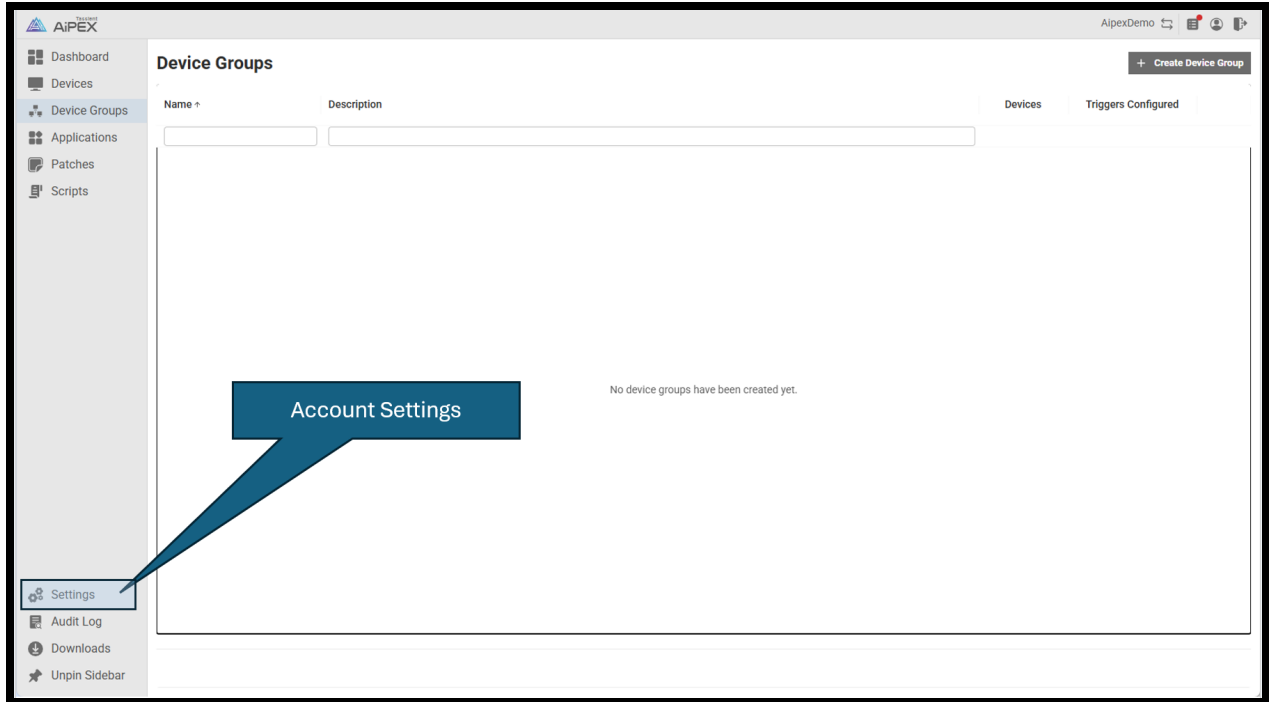
○ Create Device Groups

Device Groups are a convenient way to group devices that share commonalities, assign different administrators, and apply mass actions (scripts) to them. To create a new group, click the Device Groups icon (three computers in a triangle) and then click Create Device Group in the upper right corner. In the Group Name text box, enter a descriptive name and then click Create. The group will appear in the list of Device Groups.



- **Add Additional Administrators**

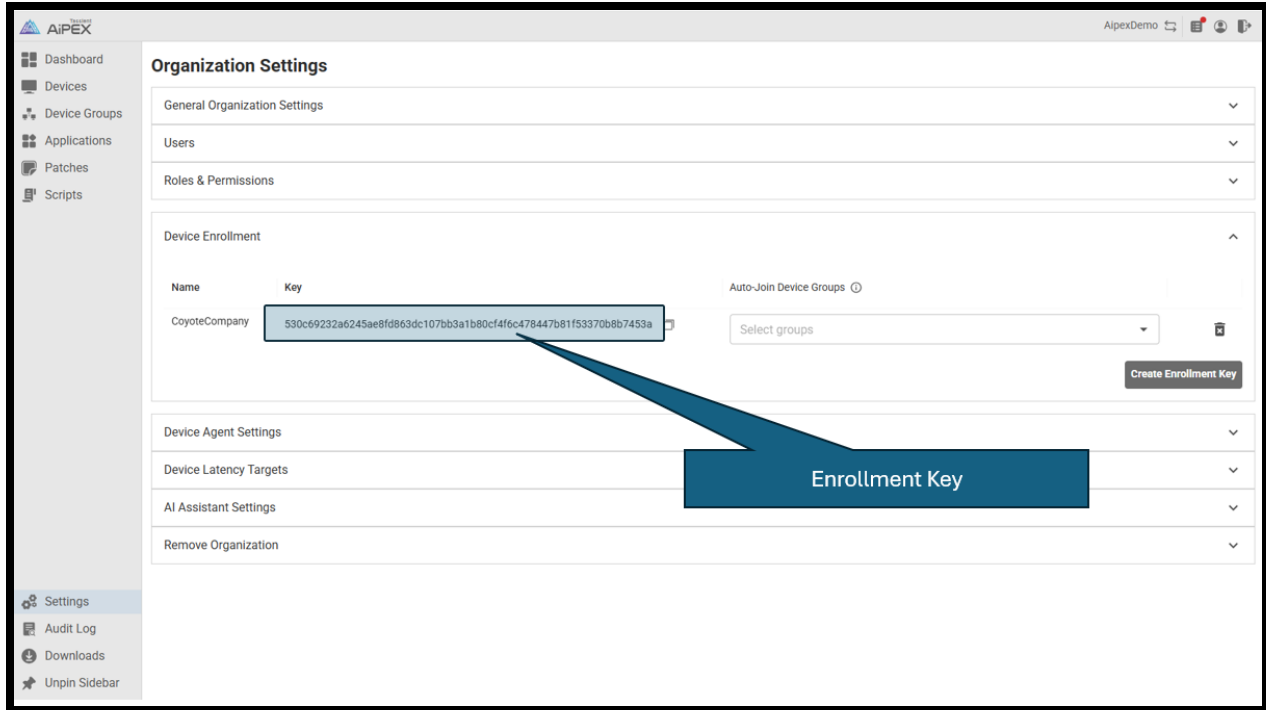
Aipex has role-based access control (RBAC), allowing administrators to be assigned to specific devices. To add administrators, click the **Settings** (gear) icon in the lower-left corner, click **Users**, then **Add Users**, enter the user's email address, use the slider to specify whether to grant them Full Control, then click **Add User**. An email will be sent to the user allowing them to register and specify their authentication method.



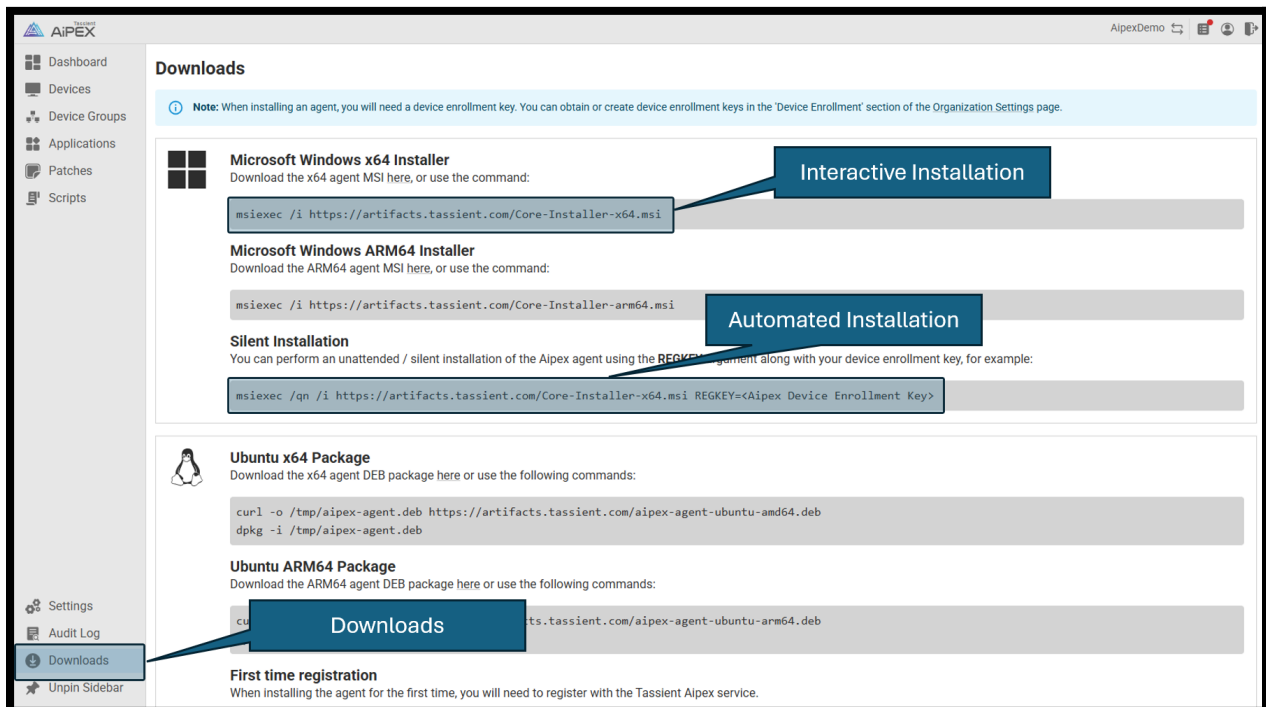
Deploying the Aipex Agent Interactively

The Aipex agent can be installed in various ways depending on the OS. We have found that many people choose to first interactively install Aipex's agent on a few devices, as this allows them to see and experiment with the capabilities of Aipex instantly.

A link to the agent can be found by clicking **Downloads** in the lower-left corner of the dashboard.



This dashboard contains instructions for installing the agent based on the device's OS and method. This, along with the enrollment key, allows a device to be registered with Aipex.



Enrollment Key Location

The location of an organization's device enrollment key is at **Settings > Device Enrollment > Create Enrollment Key**. This will create an enrollment key. If you want a device automatically placed in a device group, use the optional **Auto-Join Device Groups** drop-down list to select the group.

Deploying the Aipex Agent Automatically

Rather than manually installing software on every machine, IT administrators can leverage existing deployment tools, such as Group Policy Objects (GPOs), Microsoft Intune, or custom scripting engines, to silently push the RMM agent to all target endpoints.

A link to the agent can be found by clicking **Downloads** in the lower-left corner. See the instructions under **Silent Installation** to perform an unattended/silent installation. To perform an install, you will need an Enrollment Key. See the Enrollment Key Location section above.

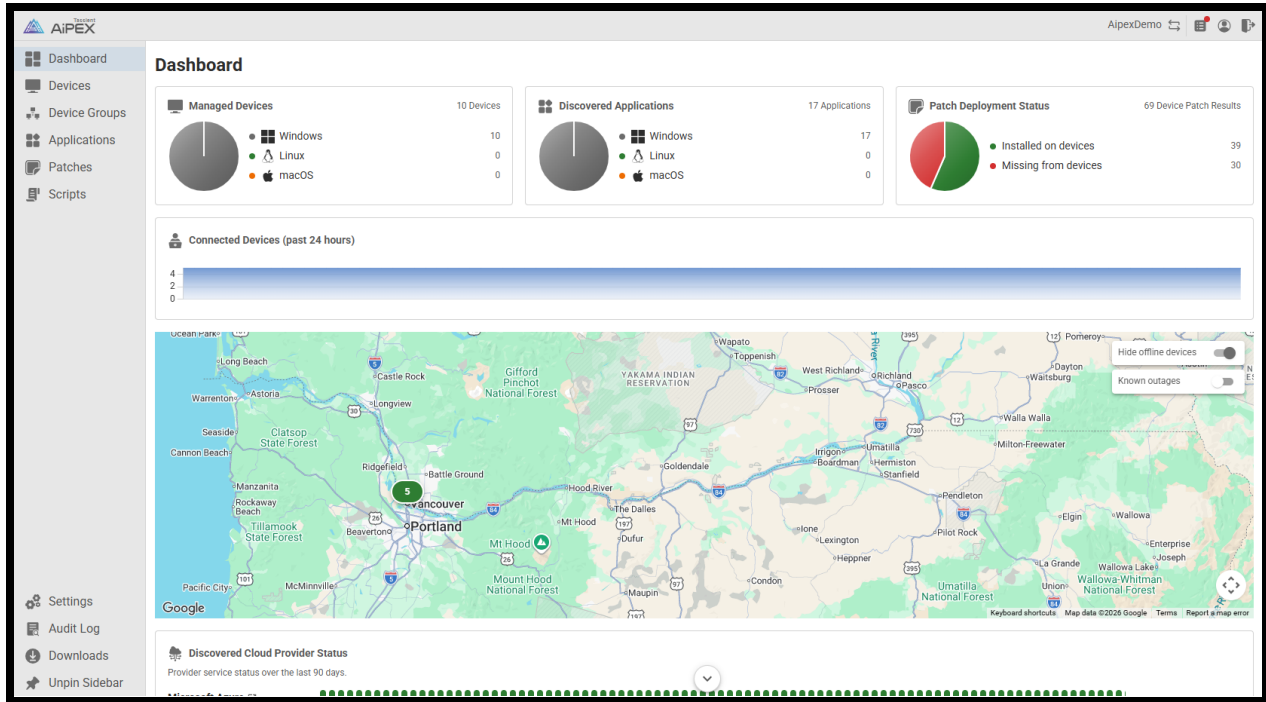
Monitoring Devices

Once the agent has been installed on a device, the device will appear on the Aipex Dashboard.

The home dashboard can always be accessed by clicking the **Dashboard** icon (four rectangles) in the upper-left corner.

Home Dashboard

The home dashboard provides an overview of all devices in your environment. (NOTE! As warned above, Aipex is developing fast, the Dashboard is continually improving, so these screenshots only capture what was available at the time this was written.)



Devices

A list of the devices that AiPex is aware of can be found by clicking the **Devices** (computer) icon on the left side of the dashboard.

The screenshot shows the AiPex Devices page with the following table:

	OS	Name	Device Groups	Current User	Last User	Operating System	OS Version	Model
☐	Windows	AIPEXCTBASE	None			Windows 10 Pro	10.0.14393.0	VMware7
☐	Windows	TEST2	None	TEST2\User01	TEST2\User01	Windows 10 Pro	10.0.14393.0	VMware7
☐	Windows	AIPEXCT01	None	AIPEXCT01\User01	AIPEXCT01\User01	Windows 10 Pro	10.0.14393.0	VMware7
☐	Windows	AIPEXIOR	None	AIPEXIOR\User01	AIPEXIOR\User01	Windows 10 Pro	10.0.14393.0	VMware7
☐	Windows	IORTESTBASE	None	IORTESTBASE\User01	IORTESTBASE\User01	Windows 10 Pro	10.0.14393.0	VMware7

Annotations in the image:

- Devices:** Points to the 'Devices' tab in the left sidebar.
- Remote Shell:** Points to the 'Remote Shell' icon (terminal) in the 'Device Groups' column.
- Remote Console:** Points to the 'Remote Console' icon (computer) in the 'Device Groups' column.

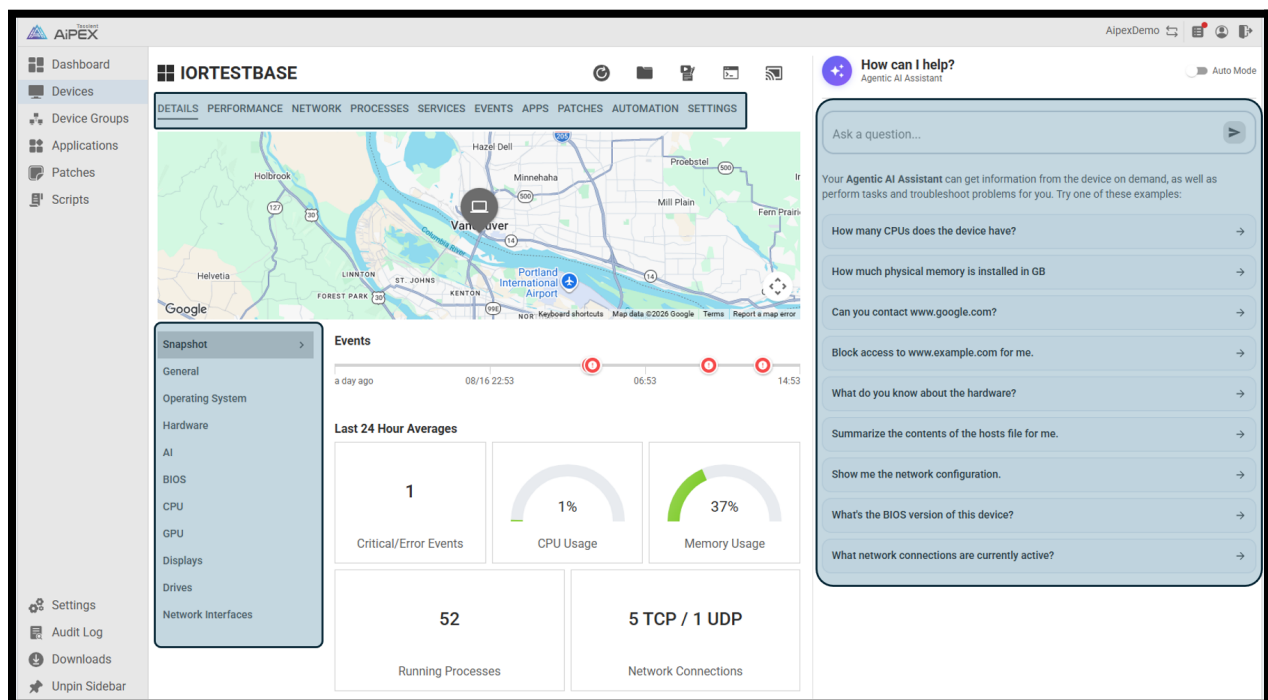
You can connect to the device's command line by clicking the **Remote Shell** (prompt) icon. Clicking the **Remote Console** (computer) icon will initiate a remote session to the device.

This dashboard displays relevant, static information about the devices. More detailed, dynamic information about a device can be obtained by clicking its name.

This dashboard's sortable, filterable grid displays relevant, static information about the devices. More detailed, dynamic information about a device can be obtained by clicking its name, which will bring you to the device's dashboard.

Exploring and Managing a Device

A device's dashboard displays detailed information about the device, lets you manage it, and lets you drill down for more details. The initial dashboard defaults to the **Snapshot** dashboard.



The top row of a device's **snapshot** dashboard displays the device's name along with icons to restart the device, transfer files to and from it, run actions (scripts) on it, open a remote shell to it, and open a remote console to it. Hovering over some icons displays more information.

The column on the left will provide detailed information about the device's static properties.

The panel on the right-hand side is the **Aipex powerful AI Assistant**.

AI Assistant

The AI Assistant is what sets Aipex apart from other RMM solutions, as it lets you ask for information about a device and perform actions on it in natural language. Using the AI Assistant, you do not need to know the device's operating system or hardware specifications. For example, in the **AI Assistant** dialog box, enter “What ports are open,” and, independent of the operating system, it runs the correct commands and displays the open ports.

Windows 11

I checked the listening ports on the device. I can confirm these services are listening on local interfaces, but I cannot confirm true internet exposure from the device alone without an external port scan or router/NAT inspection.

Ports that are listening

- **TCP:** 135, 139, 445, 5040, 7680, 11434, 59551
- **UDP:** 123, 137, 138, 5050, 5353, 5355

Notable ones

- **445 / 139** — SMB file sharing
- **135** — RPC Endpoint Mapper
- **123** — NTP
- **5353 / 5355** — mDNS / LLMNR discovery
- **11434** — Ollama service

Important caveat

- Ports bound to `0.0.0.0` or `::` are listening on all IPv4/IPv6 interfaces.
- Whether they are actually reachable from outside the network depends on:
 - Windows Firewall rules
 - Router/NAT port forwarding
 - Any upstream security appliance

If you want, I can next check the **Windows Firewall** rules to see which of these are actually allowed inbound.

Linux

Result

I checked the common Linux firewall managers on this host:

- `nft` — not installed
- `iptables` — not installed
- `ufw` — not installed
- `firewall-cmd` — not installed

And from the socket scan we already performed:

- **No listening TCP ports**
- **No listening UDP ports**
- Only an **outbound HTTPS connection** was present

Bottom line

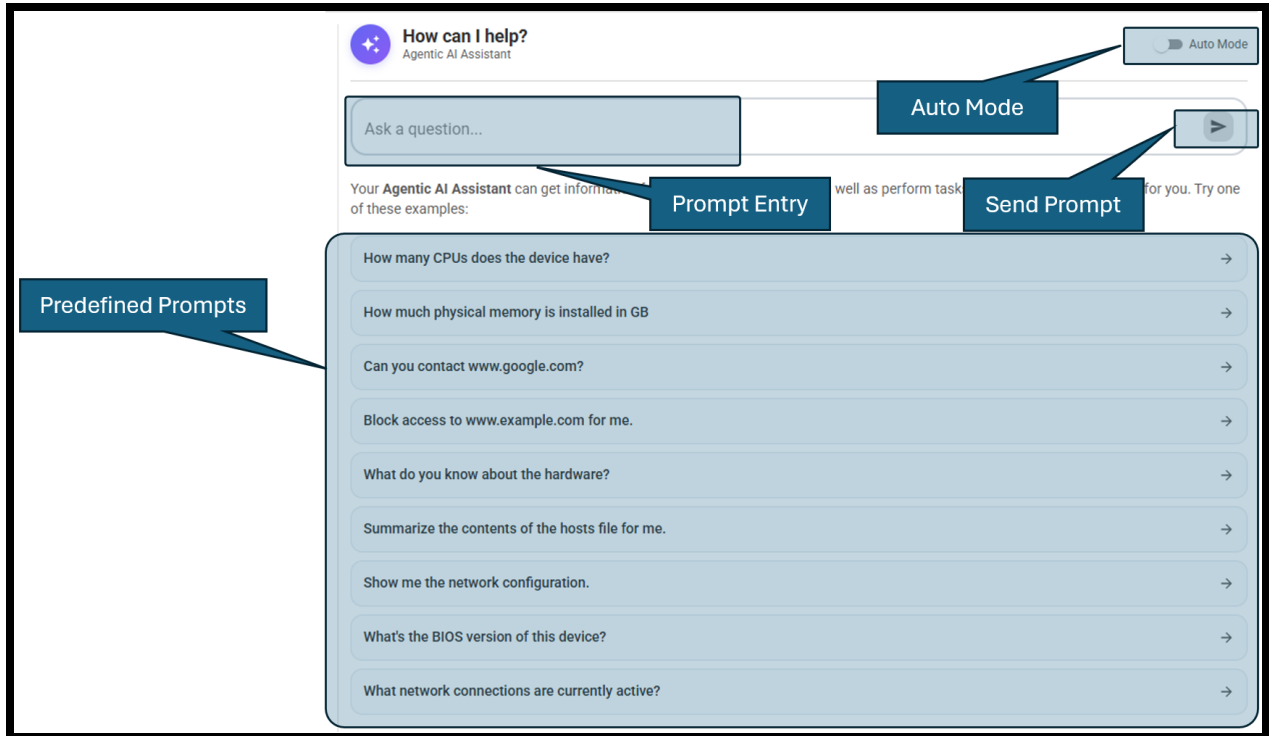
There are **no services on this machine currently listening on ports that would be exposed to the outside world.**

What I **cannot** verify from the host alone is any **upstream network firewall / NAT / security group** outside this machine. If there is one, that would need to be checked separately.

You can not only ask specific questions, but you can also ask more open-ended ones, like “*Why is this system running slow?*” “*When did this system crash, and why?*” “*Who is currently logged on to the system?*” “*What CVEs apply to this system?*” As Aipex does not use predefined scripts to answer questions, they are only limited by your imagination.

AI Assistant Controls

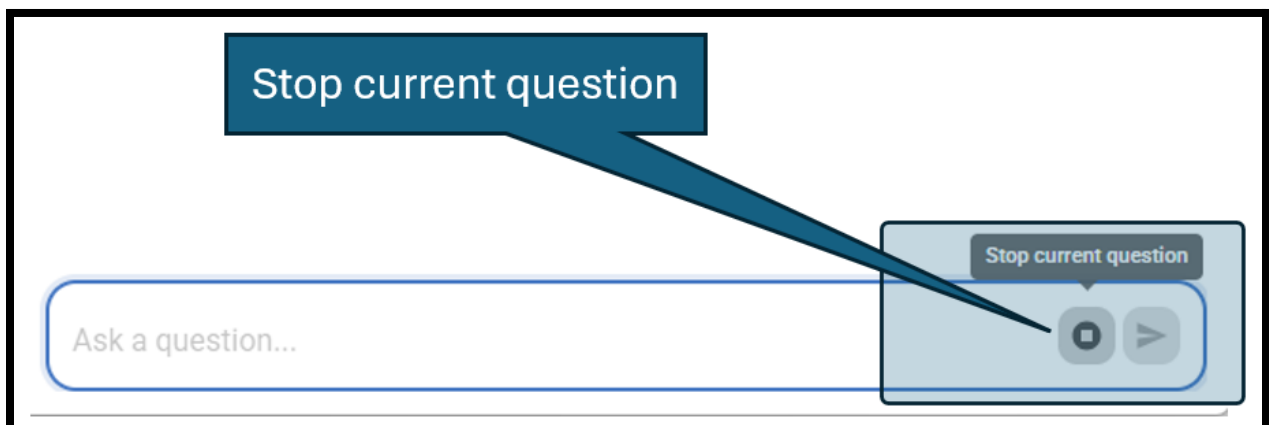
The AI Assistant panel has various prompt entry points and controls.



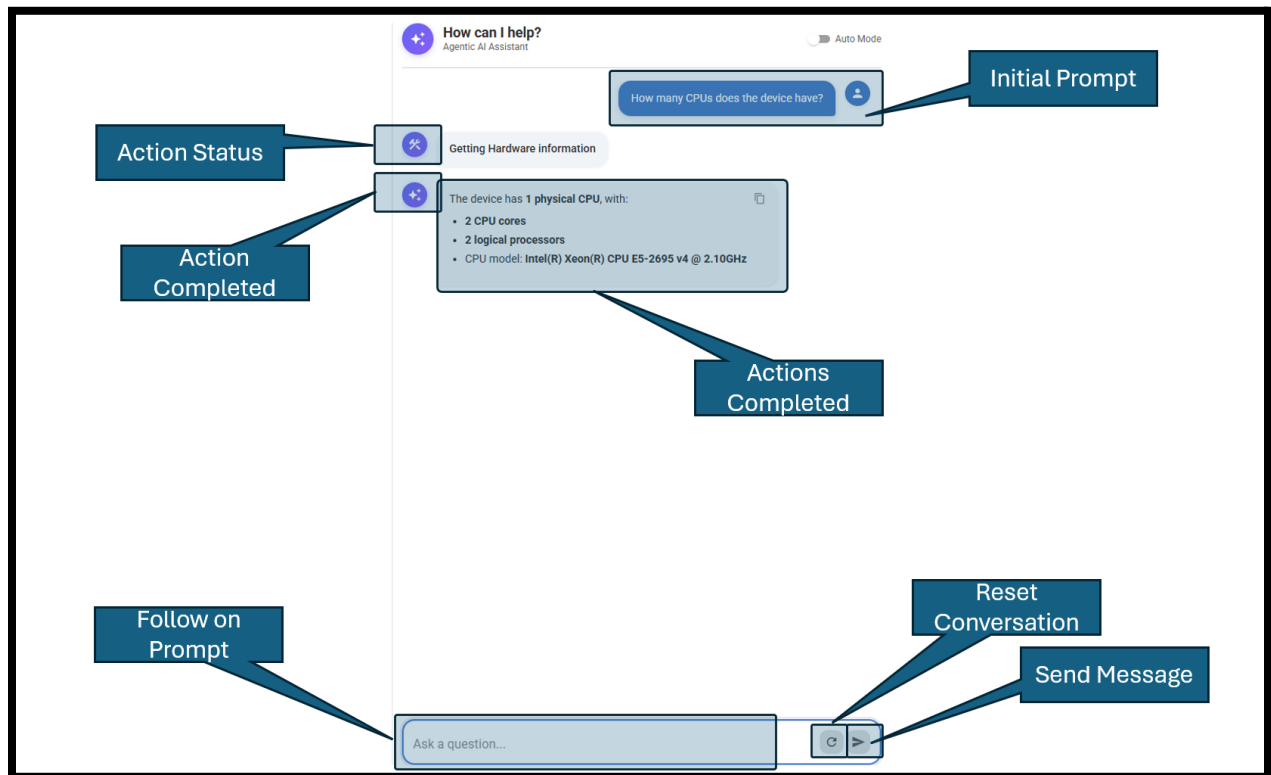
The initial screen has a **Prompt Entry** text box. After a prompt has been entered, you can either press the Enter key or select the **Send Message** icon to submit your prompt.

Under the Prompt Entry text box, there are various **Predefined Prompts**. You can select the arrow next to the predefined prompts to submit them or enter a prompt from one of the predefined prompts.

If you would like to abort the prompt you entered, click the **Stop Current Question** icon.



The **Auto Mode** slider allows the assistant to run tools and make changes without your consent. We recommend leaving this toggled to disabled until you are comfortable with the AI assistant's power and capabilities.

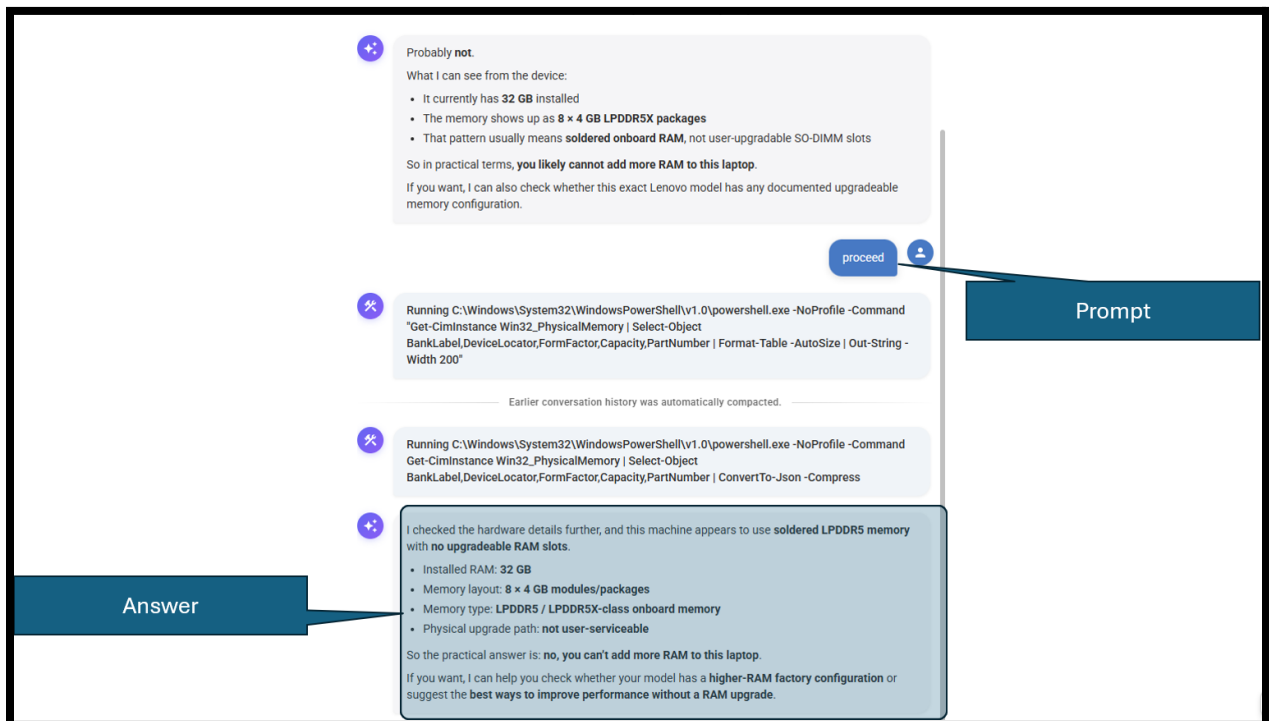


AI Assistant Example

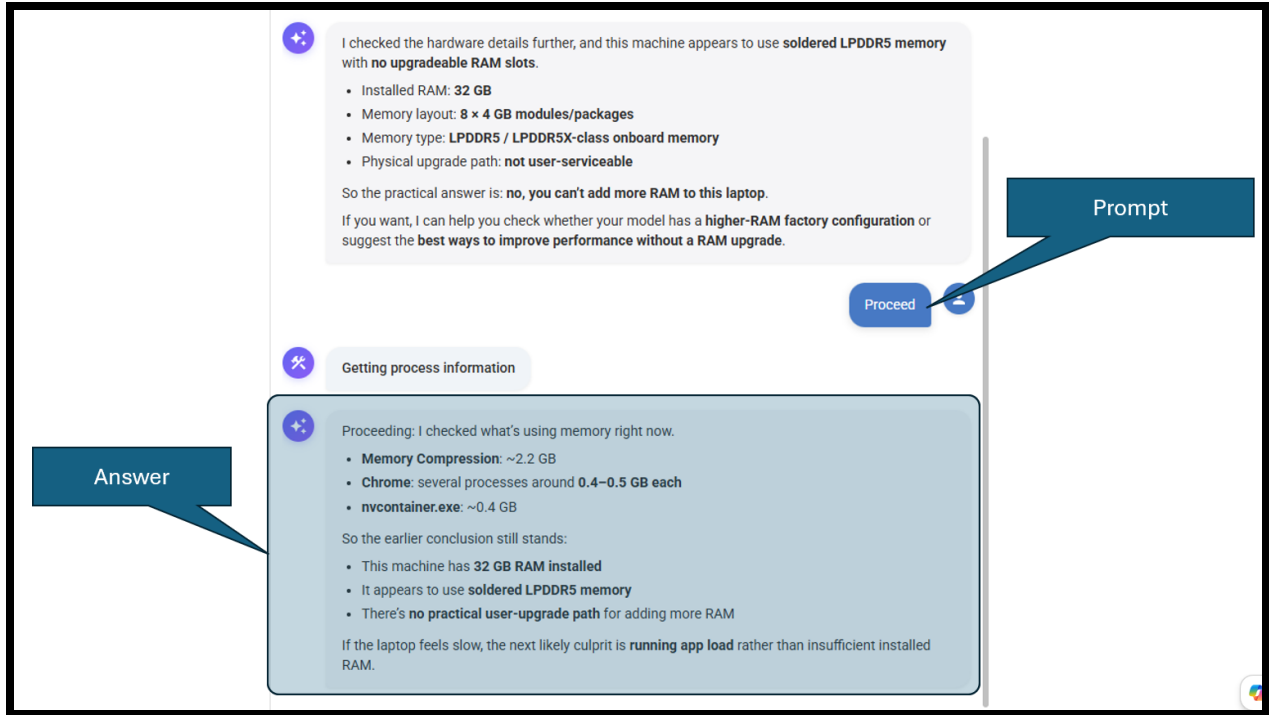
If you have a system with consistently high memory usage, you can start by clicking the “*How much physical memory is installed in GB?*” prompt. The answer can serve as a stepping stone to more information; in many cases, the AI Assistant will ask you if you would like more information or to perform an action on the device.



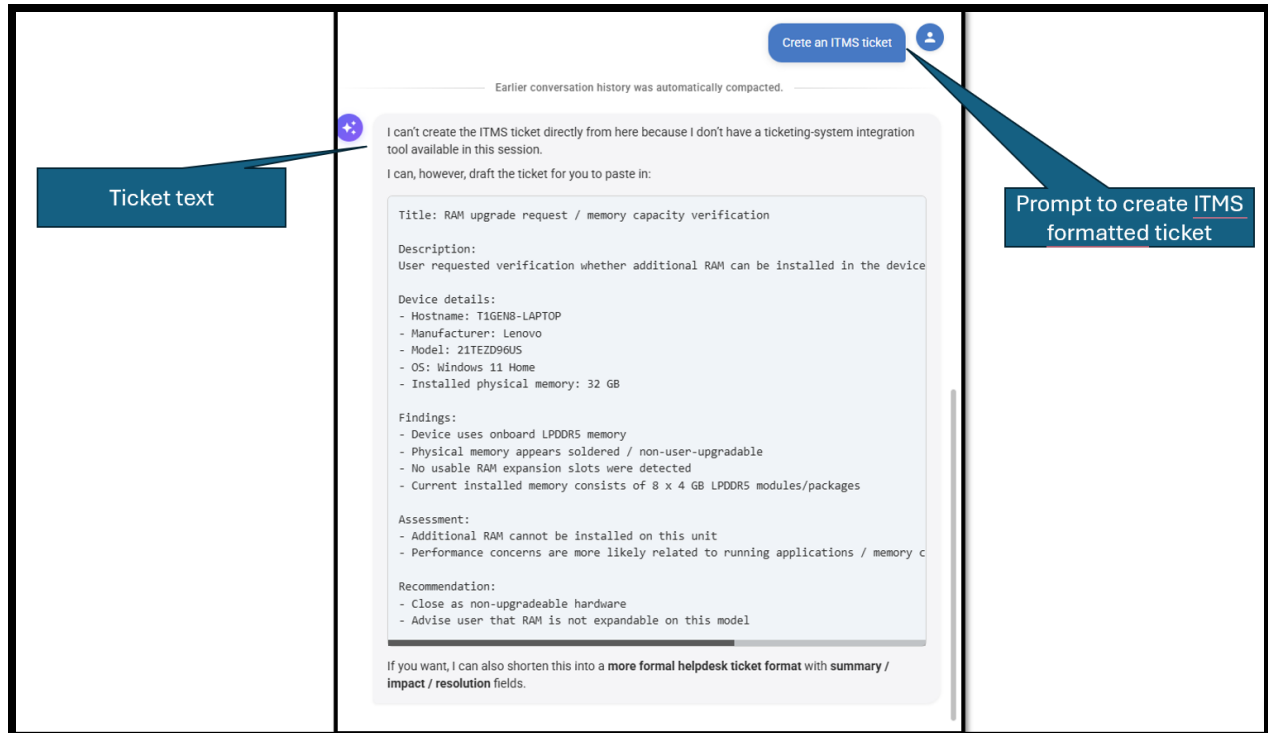
Entering “*proceed*” will initiate further actions suggested by the Assistant.



The AI Assistant will check sources for specific information.



Most companies use ITSM or other ticketing formats. The AI Assistant can create the text for them for you based on the information it has obtained and the actions it has taken.

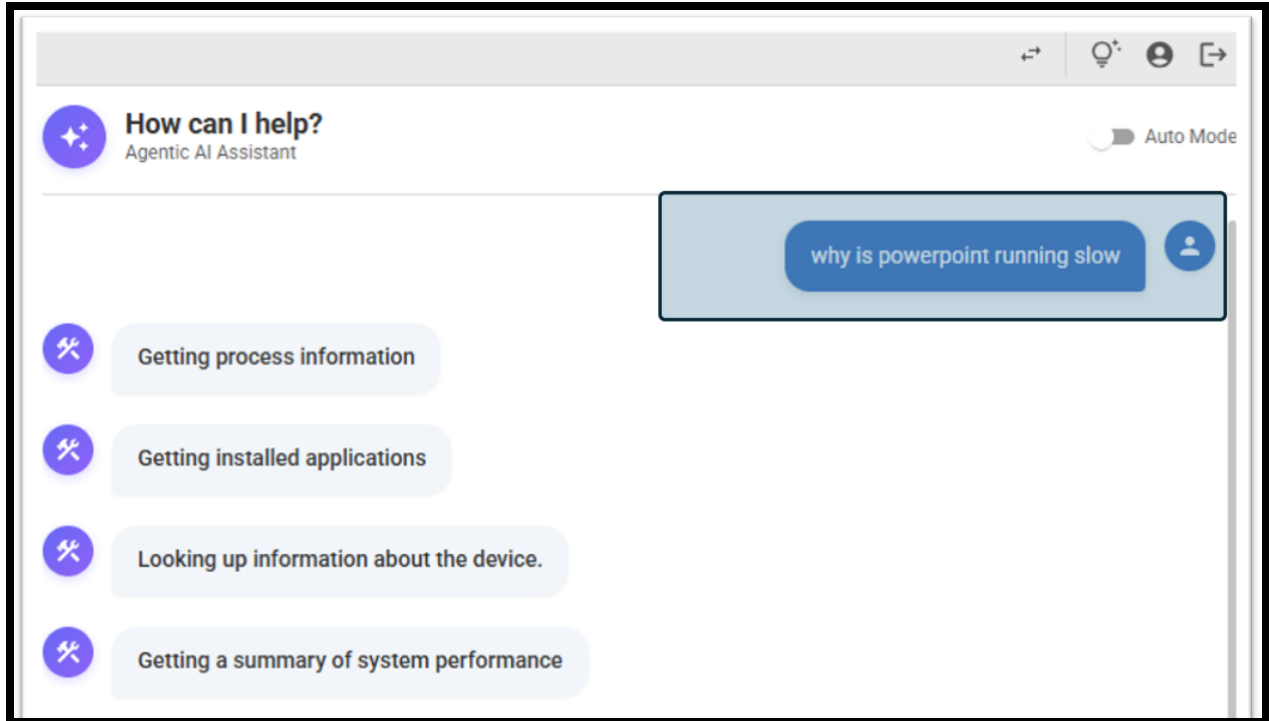


The power and flexibility of the AI Assistant are endless. The AI Assistant is OS-agnostic, so regardless of the OS you are on, it will do as instructed using natural language, so there is no need to learn the syntax or parlance of a particular OS.

AI Assistant and Application Example

The AI assistant also works for applications. For example, if a specific application hangs, you can ask why it is not responding. It will investigate the problem, report the cause, and, more importantly, suggest a solution and, if you instruct it, implement it. Finally, you can have it create a help ticket by simply asking.

In one case, a user's PowerPoint application was running slowly, so the administrator entered "*Why is PowerPoint running slow?*"



The AI Assistant identified an issue with a Camtasia plugin and resolved it by disabling it.



PowerPoint was likely running slow because of the **Camtasia PowerPoint add-in**.

What I found:

- PowerPoint itself was only using about **450 MB** of RAM.
- The device wasn't under heavy system load:
 - CPU averaged about **15%**
 - Free memory stayed above **51%**
- The **Camtasia Add-in** was enabled for PowerPoint:
 - `CamtasiaOfficeAddin.Connect`
- Camtasia-related processes were also using a lot of resources:
 - `CamtasiaRecorder.exe`
 - `CamtasiaStudio.exe`

What I changed:

- I **disabled the Camtasia PowerPoint add-in** by setting its `LoadBehavior` to `0`.

Result:

- PowerPoint should start and behave more smoothly **after you restart PowerPoint**.

If you want, I can also help check whether any other Office add-ins are slowing it down.

The administrator then asked the AI Assistant to create an ITSM-formatted ticket for the incident.



Absolutely – here's a polished helpdesk ticket you can paste into your ITSM system:

Title: PowerPoint running slowly - Camtasia add-in identified as likely cause

Priority: Medium

Issue Summary:

User reported that Microsoft PowerPoint was running slowly on the device.

Impact:

PowerPoint performance degradation is affecting normal use.

Investigation Summary:

- Microsoft PowerPoint process was running normally from a resource perspective.
- System load was not excessive.
- Available memory remained healthy.
- Camtasia-related processes were active and consuming significant resources.
- The PowerPoint add-in `CamtasiaOfficeAddin.Connect` was enabled and likely contributed to the issue.

Findings:

- PowerPoint:
 - `POWERPNT.EXE` running from:
`C:\Program Files\Microsoft Office\root\Office16\POWERPNT.EXE`
- Camtasia processes observed:
 - `CamtasiaRecorder.exe`
 - `CamtasiaStudio.exe`
- Office add-in found:
 - `CamtasiaOfficeAddin.Connect`
 - Friendly name: Camtasia Add-in
 - Description: Add Camtasia recording to PowerPoint
 - LoadBehavior was set to `3` (enabled)

Remediation Performed:

- Disabled the Camtasia PowerPoint add-in by setting:
`HKLM\Software\Microsoft\Office\PowerPoint\Addins\CamtasiaOfficeAddin.Connect\LoadBehavior` to `0`

Expected Outcome:

- PowerPoint should perform more smoothly after restarting the application.

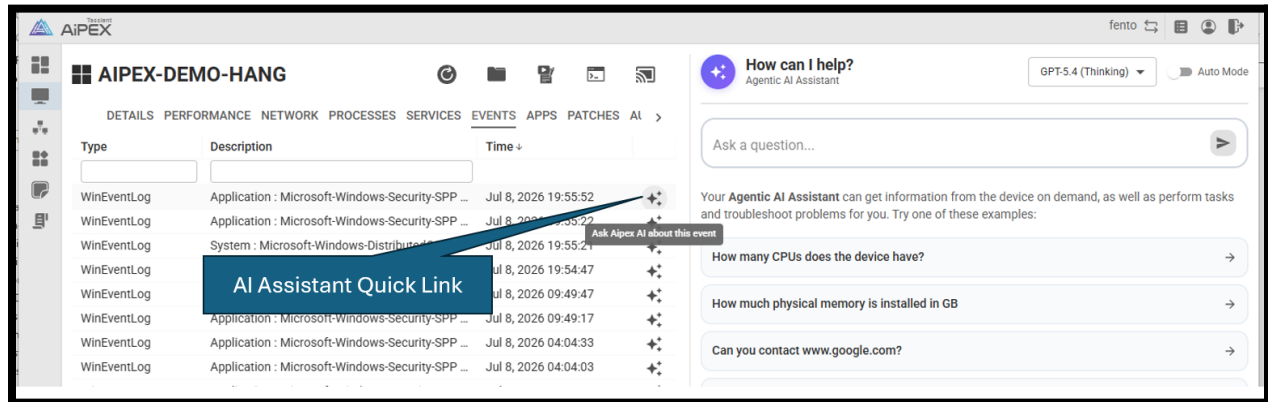
Notes:

- If the issue continues, review additional Office add-ins and background applications

If you want, I can also format this as a shorter **1-paragraph incident note** or a **formal ITSM template**.

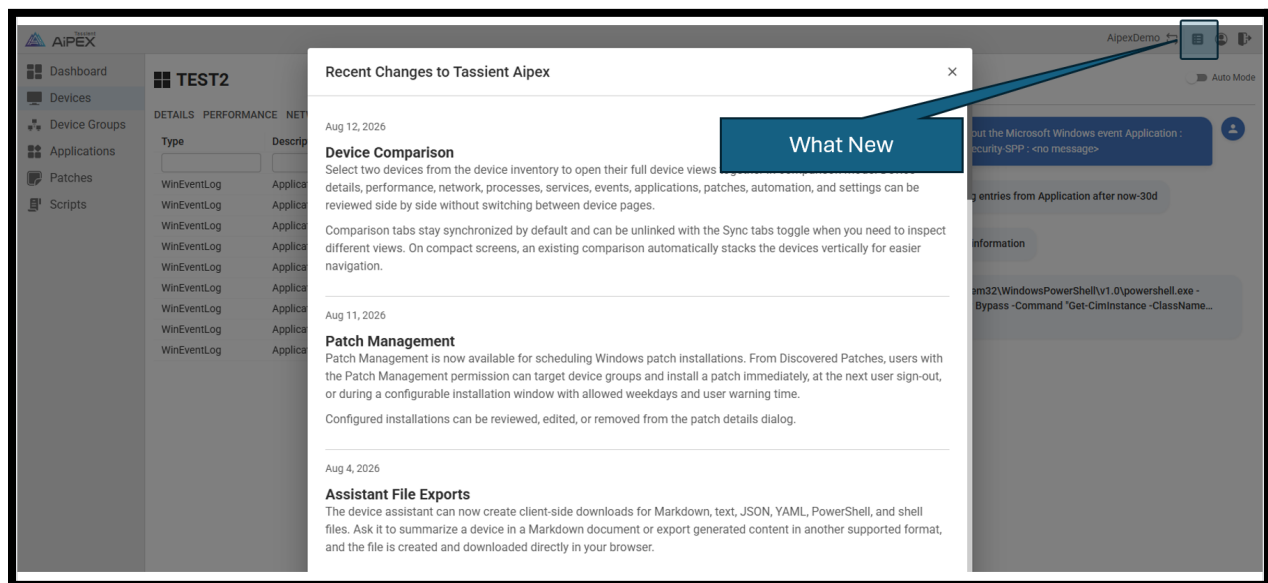
AI Assistant Quick Links

The AI Assistant can also be accessed directly from various other places in Aipex by clicking on its icon. For example, on the device's Events dashboard, there is a quick link to the AI Assistant that, when clicked, auto-fills and executes an AI Assistant request.



Latest Features and Functions

New features and functionality are regularly being added to Aipex. Clicking the **What's New** icon in the upper right of the screen will show you these.



Feel free to contact us at info@tassient.com with any feedback, issues, suggestions, or questions regarding our product.

This document is only a brief starting point for your journey with Aipex and should get you started with the product. Feel free to contact us for a more in-depth session to help you uncover its value using your system or one of our demo systems.